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200 PROCESSED CHERRY PRODUCTION FALLS IN FRANCE AND ITALY

French production of glace cherries was up in 1976/77, but is expected to drop in 1977/78, along with exports. In Italy, brined cherry output and exports will also be lower in 1977/78.

France

Following a 1976 fresh cherry crop of 137,000 tons, 1976/77 glace cherry production reached 10,000 tons. Glace production for 1977/78 is expected to drop to 9,000 tons in the wake of a fresh cherry crop of only 50,000 tons in 1977 because of two April frosts.

Output of the Napoleon variety, grown for processing, was down 50 to 60 percent from the average level of 35,000-38,000 tons, with fruit sizes ranging from below average to average with numerous small sizes. Glace cherry production will not be affected in proportion to the reduced fresh crop because 6,000 tons of the expected total production of 9,000 tons may be produced from imported brined cherries.

The reduced fresh cherry crop resulted in higher prices paid by processors to growers. An agreement between cherry growers and processors was reached in 1976/77 that included 0.32 French francs (FF)/kg (0.03 cents/lb) financial aid to growers granted by the French Agricultural Intervention Agency (FORMA). However, it is reported that cherry growers received an average of only 2.10 FF/kg (20.1 cents/lb) for the 1976 crop, which was under the price officially set in the agreement, 2.50 FF/kg (24.0 cents/lb).

This season French Napoleon cherry growers were requesting 3 FF/kg (27.6 cents/lb) from processors for one-fourth of their output and an average fresh market price for the remaining part of their production. Since processors have refused to link the processing price to the fresh market, no agreement has yet been reached.

Consumption of glace cherries in France in 1976/77, almost entirely accounted for by the food industry (bakery products and candy makers), continued a downward trend

to an estimated 2,000 tons. While demand is expected to increase in 1977/78, processors' stocks of all processed cherry products are still at a very high level of 2,500 tons.

Estimated 1976/77 exports of glace cherries from France totaled 8,700 tons. Exports to Germany and the United Kingdom increased over the previous year by 15 percent and 30 percent, respectively. Total 1977/78 exports are forecast at around 7,500-8,000 tons.

Glace cherry exports to Italy are of particular interest since many French glace cherries are produced from Italian brined cherries. Though both countries produce glace cherries and are paid comparable prices by both French and Italian processors, Italian consumers prefer French glace cherries. Due to the short French cherry crop, export availability will depend largely on the brined cherry supply from Italy.

Italy

The 1977 Italian fresh cherry crop is estimated at 145,000 tons, 7 percent less than that of the previous year. The reduced crop resulted from low temperatures and April frosts in the growing areas of Piedmont, Emilia Romagna, and Apulia. Although production increased in the growing area of Campania, June rains and hot weather caused some worm damage and a high percentage of fruit splittings.

Brined cherry output is estimated at 9,000 tons, 18 percent less than the 1976/77 level. The high incidence of fruit splitting in the 1977 crop will result in higher than normal output of third-quality brined cherries.

High prices and lower availability of fresh cherries caused the reduction in brined cherry production. The reduced supply of fresh cherries was due not only to lower output, but to increased demand by French briners and other Italian processors and canners. Since the E-123 coloring agent was banned by the Italian Government on May 31, 1977, processors and canners have increased their demand for fresh black cherries for use as a natural colorant.

The cost of cherries to briners in 1977/78, including transportation and commission, is expected to average 530 lire/kg (27 cents/lb) compared with 310 lire/kg (16 cents/lb) in the preceding year. The season began with farmers' prices for "Fiore" of the Forli area at 360-380 lire/kg (18-19 cents/lb) (37 percent more than last year). After the first few days in the Campania area, prices were 390-410 lire (20-21 cents/lb) for "Maiatica" and 540-560 lire (28-29 cents/lb) for "imperiale."

Processing costs are expected to increase by 37.5 percent.

High producer costs may result in further increases in consumer prices, causing a continuation of the 1976/77 decline in domestic consumption when consumers substituted products like candied turnips and pumpkins.

The 1977/78 forecast for brined cherry exports is 8,000 tons, 25 percent less than in 1976/77. However, Australia, Japan, and South Africa have been showing increased interest in imports.

The information in this circular was prepared by Carol M. Brick (202) 447-2083.

FRESH, BRINED, and GLACE CHERRY PRODUCTION: FRANCE and ITALY
1973/74-1977/78
(Metric tons)

Item and Country	1973/74	1974/75	1975/76	1976/77	1977/78
FRESH (Total Crop)					
France	105,000	124,000	89,000	137,000	50,000
Italy	178,000	139,000	190,400	156,300	145,000
Total Fresh	283,000	263,000	279,400	293,300	195,000
BRINED					
Italy	9,000	10,700	12,000	11,000	9,000
GLACE					
France:					
From domestic cherries..	8,760	8,865	3,700	5,200	3,000
From imported brined cherries	6,040	4,435	5,300	4,800	6,000
Total Production..	14,800	13,300	9,000	10,000	9,000

PROCESSED CHERRIES: EXPORTS FROM ITALY and FRANCE^{1/}
 1973/74-1977/78
 (Metric tons)

Item and Country of Destination	1973/74	1974/75	1975/76	1976/77	1977/78
<u>BRINED CHERRIES (ITALY)</u>					
Australia	1,348	819	173	1,291	2/
Canada	787	90	2,404	1,306	2/
France	4,842	1,476	6,252	2,750	2/
Japan	---	---	306	1,014	2/
South Africa	---	559	268	682	2/
United Kingdom	2,721	1,258	2,607	1,957	2/
United States	159	---	---	---	2/
Other	2,894	1,462	2,204	1,657	2/
Total	12,751	5,664	14,214	10,657	3/8,000
<u>GLACE CHERRIES (FRANCE)^{3/}</u>					
Germany, Fed. Rep.	1,630	1,440	1,310	1,500	2/
United Kingdom	5,280	3,205	3,470	4,500	2/
United States	1,895	880	485	225	2/
Other	3,190	2,635	2,235	2,475	2/
Total	11,995	8,160	7,500	8,700	3/7,500-8,000

1/ Year beginning June 1 in Italy, July 1 in France.

2/ Data not available.

3/ Attache estimate.

ITALIAN BRINED CHERRIES: AVERAGE F.O.B. PRICES^{1/}
 1972-1977

Type	1972	1973	1974	1975	1976	1977 ^{2/}
Brined cherries, Class I						
lire/kg.	350	660	895	455	720	1,125
\$US/lb. ^{3/} ....	.27	.51	.63	.33	.39	.58
Brined cherries, Class II						
lire/kg.	325	630	865	430	660	995
\$US/lb. ^{3/} ....	.25	.49	.61	.31	.36	.51
Brined cherries, Class III						
lire/kg.	250	535	700	350	580	850
\$US/lb. ^{3/} ....	.20	.42	.49	.25	.31	.44

1/ Naples mid-June quotation.

2/ November prices as follows: First Quality, 1,100-1,200 lire/kg.; Second Quality, 850-1,170 lire/kg.; Third Quality, 700-900 lire/kg.; Halves, 1,100-1,300 lire/kg.

3/ Converted to U.S. dollars based on the exchange rate at the end of June of each year.